

# **Dental Portal User Manual**

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## **1 INTRODUCTION**

This guide will take you through the functions and features of the dental portal and explains how to access the various features.

The guide takes you through the initial portal activation process, logging in to your portal account and then how to access the information and features in the portal.

## **2 INITIAL STEPS**

Once your activation letter/email has been received you should be able to activate your portal account using the activation code contained in the letter or email. Click on the link (or cut and paste it into your internet browser navigation bar) to navigate to the portal activation.

If you haven't received an activation code you can request one by navigating to the Request Activation Letter page via the NHSBSA website.

When activating your portal account, you will need to enter the following mandatory details:

- Provider or Performer Number
- Activation ID
- Unique email address & confirm email address
- Password and password confirmation
- Memorable word and memorable word confirmation
- Security question
- Security answer and confirm security answer

Take care before attempting to activate your portal account to ensure that your provider/performer number is to hand since you will not be able to complete the activation process without this information. You should also bear in mind that the email address, password, memorable word and in some cases your security question and answer credentials will be required to login to the portal. Be sure to use credentials that comply with the on-screen requirements and that can be remembered easily. All of these details entered are also case sensitive.

Your email address will be used for any further portal communications, e.g. in the event of an EDI PIN request or forgotten credentials situation.

## **3 LOGIN**

When you have completed the activation process the login page Figure 1 will be displayed:

**Log in to your account**

Please enter your login details below.

\* Mandatory Fields

**Your email address \***

**Password \***

If you have already set up your memorable word, enter characters 1,5 and 8. If you do not have a memorable word leave the fields blank. You will be guided through the set up of your new log in details on the following screen \*

☐ ☐ ☐

[I have forgotten my password or memorable word](#)

**Log in**

Figure 1: portal login page

Enter your email address, password and memorable word characters requested and click the *Log in* button in order to proceed. Alternatively, click on the “*I have forgotten my password or memorable word*” link in order to reset your forgotten details.

#### 4 FORGOTTEN CREDENTIALS

If you have forgotten your password or memorable word, clicking on the “*I have forgotten my password or memorable word*” link via the Login page will generate an email to your specified account.

**Enter validation details**

Enter the email address you use to log in to your Dental Services Portal Account and click Submit your details. You will be sent an email enabling you to complete step 2 of the forgotten login details process.

\* Mandatory Fields

**Your email address \***

**Submit your details**

Figure 2: forgotten password page

Once received, the email will contain a link to the Reset Login Details page. Click on the link (or paste it into your internet browser navigation bar) to open up the page [Figure 3].

### Enter details to reset your login details

To reset your Dental Services Portal Account password please provide the specified characters from your memorable word.  
 To reset your Dental Services Portal Account memorable word please provide your current password.  
 You will be able to change your Dental Services Portal Account password or memorable word after submitting this form.

\* Mandatory Fields

**Provider or Performer Number \***

**Enter your password**

**Or characters 5, 6 and 8 from your memorable word.\***

**Security question**

**Security answer\***

**Submit**

Figure 3: reset login details page

Fill out the required fields with your provider/performer number, your security answer and –

- your password (if you have forgotten your memorable word) **or**
- your memorable word characters (if you have forgotten your password).

If you have forgotten your security question or your email address you will need to contact the NHS Dental Services helpdesk for further assistance via <http://www.nhsbsa.nhs.uk/DentalServices.aspx>.

If you enter your provider/performer number, password and **security answer** correctly then the next page will enable you to update your **memorable word** credentials. Once you have entered and confirmed your new memorable word you will be redirected to the login page to confirm your login details once more. Having entered them correctly you will be allowed access to the Home page.

### Enter details to reset your memorable word

Enter the details requested in the boxes provided and click Submit to reset your Dental Services Portal Account memorable word. For security your memorable word must meet certain criteria. Click on the link by the memorable word field to view these requirements.

\* Mandatory Fields

#### Memorable word

As part of the login procedure you will also be asked for 3 characters from a memorable word you have registered. The requirements for the memorable word are listed below:

1. **Must be** between 8 and 20 characters in length
2. **Must contain** at least 1 numeric and 1 alphabetic character
3. **Must not** be the same as the password of the user account or the User Account Name

Enter a memorable word \*

Confirm your memorable word \*

Submit

Figure 4: change memorable word page

If you enter your provider/performer number, password and **memorable word** correctly then the next page will enable you to update your **password** credentials.

### Enter details to reset your password

Enter the details requested in the boxes provided and click Submit to reset your Dental Services Portal Account password. For security your password must meet certain criteria. Click on the link by the password field to view these requirements.

\* Mandatory Fields

#### Password

1. **Passwords must be** between 8 and 20 characters long.
2. **Must not** contain the word 'password' or your provider/performer number (where you have one).
3. **Must use** 3 of the following types of character:  
Upper case (capital) letter, lower case (non-capital) letter, number, special character (such as @ # \$ \_ - %).

Enter a password \*

Confirm your password \*

Submit

Figure 5: reset password page

Once you have entered and confirmed your new password you will be redirected to the login page to confirm your login details once more. Having entered them correctly you will be allowed access to the Home page.

After logging in, you may logout of the portal at any time by clicking on the Log Out link in the top left-hand corner of the page [Figure 6]. Please remember to close your internet browser after you do so.

Hello, Fred Surname  
Last Logged in 14/06/2012 15:41  
[Log Out](#)

Figure 6: logout button

## 5 HOME

Having successfully logged into the portal you will be directed to the home page [Figure 7], tailored to the specific requirements of your role i.e. provider, performer or provider/performer

- Navigation Links – click to navigate to the desired portal functionality.
- System Messages – announcements and information from the BSA. Users may see some variation in the messages displayed depending on various criteria including role, geography, commissioning body and other factors.
- Quick-start links - click to navigate to the desired portal functionality. Users may see some variation in quick-start links displayed depending upon role.



Figure 7: provider home page

## 6 MY PROFILE

The My Profile page [Figure 8] enables you to update your personal contact details and login/security credentials, with options to:

- Change your email address
- Change your correspondence address
- Change your contact telephone number
- Change your password



- Change your memorable word
- Change your security question and answer

**Summary**

The following contact details will be used by NHS Dental Services to contact you directly. The details will not be used to contact you regarding contract related information which is managed at the contract level (e.g. superannuation statements and schedules).

---

**Email address**  
 awesome.dentist@hotmail.co.uk [Change email address](#)

---

**Correspondence address**  
 Dental Surgery Northenden Health Centre  
 WHITEHAVEN  
 BB4 7QX [Change correspondence address](#)

---

**Contact Number**  
 07775676217 [Change contact number](#) **Changes saved ✓**

---

**Password**  
 Your password expires in 89 day(s) [Change password](#)

---

**Memorable word**  
 Change your memorable word [Change memorable word](#)

---

**Security question details**  
 Change your security question and answer [Change security question details](#)

Figure 8: my profile page

All actions on this page follow more or less the same basic steps, namely being:

1. Click on the item to be changed
2. Enter the new item values (e.g. new telephone number)
3. Click *Save changes*
4. Confirm your current password
5. Click on *Proceed* to save the changes
6. *Optionally you may quit the change at any time by clicking on the Cancel button*

Some things you should be aware of:

- *If you change your email address, you will **never** be able to revert to the previous email. Please think very carefully before you go ahead with this action since it is irrevocable.*
- *Your correspondence address can be searched for by postcode and selected from a list of results or entered manually. Whichever method you choose, the Title field is mandatory.*
- *Your security credentials (password, memorable word, security question details) must follow the on-screen requirements and should not be shared with anyone.*

## 7 CONTRACTS

Clicking on the Contracts button will immediately open the current contracts page. Options to search for contracts via the find contracts page or update contract bank details via the manage bank details page are also made available.

### 7.1 Current Contracts

Current contract listing						
This table is a summary of all your current contracts. Blue underlined items can be selected to view more detailed information. <b>Note</b> that all activity information displayed in this table relates to the previous financial year 2010/11 and not the current financial year. The next release of the portal will display current financial year data and the ability to view historic activity for the previous 24 months.						
Showing 1-5 of 5 items						
Contract number	Provider	Contract value	UDA		UOA	
			Contracted	Processing	Contracted	Processing
<a href="#">(5N3) 243779 0001</a>	MISS SC Wilson	£783,363.32	26,556.00	-	0.00	-
<a href="#">(5N3) 243779 0002</a>	MISS SC Wilson	£0.00	0.00	-	0.00	-
<a href="#">(5N3) 243779 0003</a>	MISS SC Wilson	£323,558.05	12,000.00	-	0.00	-
<a href="#">(5N3) 243779 0004</a>	MISS SC Wilson	£240,000.00	8,500.00	-	0.00	-
<a href="#">(5N3) 243779 0005</a>	MISS SC Wilson	£376,322.99	15,309.00	-	0.00	-
Showing 1-5 of 5 items						
1-5						

Figure 9: current contracts (provider view)

Depending on whether you are a provider [Figure 9: current contracts (provider view)Figure 9] or a performer [Figure 11] you may see a slightly different view:

- **Both** Contract number
  - The unique contract reference, made up of the PCT/Commissioner/PDS/SHA organisation code, the provider number and the contract iteration [tag].
- **Both** Provider
  - The name of the contract provider.
- **Provider** Contract value
  - The total contract value for the current financial year.
- **Provider** UDA contracted
  - The Units of Dental Activity contracted for the current financial year.
- **Provider** UDA processing
  - The Units of Dental Activity to-date for the current financial year. (value not available till Sep 2012)
- **Provider** UOA contracted
  - The Units of Orthodontic Activity contracted for the current financial year.
- **Provider** UOA processing

- The Units of Orthodontic Activity to-date for the current financial year. (value not available till Sep 2012)
- **Performer** UDA pre-scheduled
  - The Units of Dental Activity to-date for the current financial year. (value not available till Sep 2012)
- **Performer** UOA pre-scheduled
  - The Units of Orthodontic Activity to-date for the current financial year. (value not available till Sep 2012)
- **Performer** contracted allocation
  - The performer allocation for the contract
- **Performer** superannuation amount.
  - The performer superannuation amount for the contract.

If you are a provider-performer (logged in as a provider - by default), you may change to the performer view by clicking on the *Switch to performer* link [Figure 10]. When viewing pages as a performer, you can switch back by clicking on the *Switch to provider* link.

Hello, Fred Surname

Logged in as: Provider [Switch to performer](#)

Last Logged in 07/07/2011 10:08

[Log Out](#)

Figure 10: change to performer or provider view here

Each column can be sorted into alphabetic or numeric order (depending on the column data) by clicking on the filter button below the column header (highlighted in red - Figure 11).

Current contract listing					
This table is a summary of all your current contracts. Blue underlined items can be selected to view more detailed information. <b>Note</b> that all activity information displayed in this table relates to the previous financial year 2010/11 and not the current financial year. The next release of the portal will display current financial year data and the ability to view historic activity for the previous 24 months.					
Showing 1-6 of 6 items					
Contract number	Provider	UDA	UOA	Contracted allocation	Superannuation amount
		Pre-scheduled	Pre-scheduled		
<a href="#">(5JE) 751952 0003</a>	MR HM Rudge	-	-	£0.00	£4.32
<a href="#">(5N3) 243779 0001</a>	MISS SC Wilson	-	-	£0.00	£0.00
<a href="#">(5N3) 243779 0002</a>	MISS SC Wilson	-	-	£0.00	£0.00
<a href="#">(5N3) 243779 0003</a>	MISS SC Wilson	-	-	£0.00	£0.00
<a href="#">(5N3) 243779 0004</a>	MISS SC Wilson	-	-	£0.00	£0.00
<a href="#">(5N3) 243779 0005</a>	MISS SC Wilson	-	-	£0.00	£0.00
Showing 1-6 of 6 items					
1-6					

Figure 11: current contracts (performer view)

Clicking on the Contract number link will open up the contract details page.

## 7.2 Contract Details – Provider view

As with the current contracts view, the information available in the contract details page(s) will vary depending on whether you are a provider or a performer, or a provider-performer in provider/performer view – see above.

Clicking on the contract number as a **provider** opens the provider details page initially with several further pages enabling you to drill down further into contract information:

- Contract other addresses
- Contractual summary
- Performers on this contract

We'll go through each page in turn. All information on these pages is read only.

## Contract details - provider details

**Contract summary**

Contract number	(5N3) 243779 0001	Contract purpose	General
Provider name	MISS SC Wilson	Contract type	PDS
Contract start date	01/04/2006	Contract sub-type	-
Contract end date	-	Prison contract	No

**Provider details**Contract other addressesContractual summaryPerformers on this contract

**Provider principal addresses**

Address title		Location ID	10466
Address	Cohens Dental Surgery 9 Woodhouse Square LONDON Crawley		
Postcode	HP5 1EU		
Email	-		
Telephone number	-		

**Provider bank details**

Account name	THE WATFORD DENT PARTNERSHIP LT	<b>Manage bank details</b>
Bank sort code	34-77-61	
Bank account number	73003602	
Bank account roll number	-	

Figure 12: provider contract details

- Contract summary
  - Contract number
    - The unique contract reference, made up of the commissioning organisation code, the provider number and the contract iteration [tag].
  - Provider name
    - The name of the contract provider.
  - Contract start date
    - The date on which the contract started.
  - Contract end date
    - The date on which the contract ended. If it is a current contract the end date field may not be populated.
  - Contract purpose
    - The intended remit of the contract. General, orthodontic or both.
  - Contract type & [Contract sub-type]
    - The type of contract. GDS, GDS [Pilot], PDS, PDS [Plus], PDS [Pilot], Trust, Trust [Plus].
  - Prison contract

- Indicates whether the contract is for a prison(s) with a Yes or No.

The providers address and bank details are also displayed on the initial contract details page. The contents should be self explanatory. Note that the Provider bank details section contains a Manage bank details button however. Clicking on this button will open the Manage bank details page, which we'll cover in section 7.5 below.

Clicking on the Contract other addresses button opens up the Provider other addresses view. Obviously where there are no additional addresses the table will be empty. The columns can be re-ordered where necessary by clicking on the filter button.

Provider details

Contract other addresses

Contractual summary

Performers on this contract

Provider other addresses

Address type	Address title	Address	Postcode	Telephone number
Correspondence Address		S C A Community Care Services, RUSHDEN, HORLEY, Cornwall	DY6 8DN	

Showing 1-1 of 1 items

Figure 13: provider other addresses

Clicking on the Contractual summary button opens up the Contractual details view containing figures for each year (or period) during the contracts previous history:

- Date from
  - Date contractual details start from.
- Date to
  - Date contractual details end on. (The date may not be present if an end date hasn't been specified).
- Contracted value
  - Contracted value for the from and to dates on the applicable row.
- Contracted UDA
  - Contracted UDA for the from and to dates on the applicable row.
- Contracted UOA
  - Contracted UOA for the from and to dates on the applicable row.
- Contracted Dom visits
  - Contracted number of courses of treatments for domiciliary visits for the from and to dates on the applicable row.
- Contracted sedations
  - Contracted number of courses of treatments for patient sedations for the from and to dates on the applicable row.

Again columns can be re-ordered as required.

Provider details	Contract other addresses	Contractual summary	Performers on this contract
------------------	--------------------------	---------------------	-----------------------------

Contractual details						
Date from	Date to	Contracted value	Contracted UDA	Contracted UOA	Contracted Dom visits	Contracted sedations
01/04/2010	-	£783,363.32	26,556	0	0	0
01/04/2009	31/03/2010	£776,375.94	26,556	0	0	0
01/04/2008	31/03/2009	£774,748.97	26,556	0	0	0
01/11/2007	31/03/2008	£749,273.67	26,556	0	0	0
01/04/2007	31/10/2007	£747,561.75	26,556	0	0	0
01/04/2006	31/03/2007	£727,447.82	26,556	0	0	0

Showing 1-6 of 6 items

1-6

Figure 14: provider contractual details

Clicking on the Performers on this contract button opens up the List of performers associated with the contract.

Provider details	Contract other addresses	Contractual summary	Performers on this contract
------------------	--------------------------	---------------------	-----------------------------

List of performers on this contract					
Performer name	Performer number	Start date	End date	VDP	Status
<a href="#">MR Anthony Joseph Palliser</a>	280992	10/08/2009	-	-	Current
<a href="#">DR Benjamin Ellis Smart</a>	882445	04/08/2008	04/08/2008	Full time	Historic
<a href="#">MISS Fersai Butwick</a>	991309	16/08/2010	-	-	Current
<a href="#">MISS Fersai Butwick</a>	991309	03/08/2009	03/08/2009	Full time	Historic
<a href="#">MR Frederek Charles Haining</a>	959545	01/04/2006	06/04/2009	-	Historic
<a href="#">MRS Jane Carolyn Cobley</a>	881031	02/08/2008	-	-	Current
<a href="#">MRS Jennifer Anne Singh</a>	357235	17/02/2010	-	-	Current
<a href="#">MS Rosemary Elizabeth Mulcahy</a>	866792	01/04/2006	-	-	Current
<a href="#">MISS Suzi Catherine Wilson</a>	243779	01/04/2006	-	-	Current

Showing 1-9 of 9 items

1-9

Figure 15: performers on the contract

The columns are self explanatory. You can drill down into further performer information by clicking on the Performer name link.

**Contract summary**

Contract number	(5N3) 243779 0001	Contract purpose	General
Provider name	MISS SC Wilson	Contract type	PDS
Contract start date	01/04/2006	Contract sub-type	-
Contract end date	-	Prison contract	No

**Performer details**

Name	DR Benjamin Ellis Smart	<b>This performer is superannuable</b>
Performer number	882445	

**Performer address details**

Address type	Address title	Address	Postcode	Telephone number
Correspondence Address		Cohens Dental Surgery, 9 Woodhouse Square, LONDON, Crawley	HP5 1EU	09674 594950
Correspondence Address		41 Berrymead Road, Crudgington, West Yorkshire, North Humberside, Lancashire	CR0 7QN	

Showing 1-2 of 2 items

1-2

**Performer contractual details**

Trainer	243779	Start date	04/08/2008
VDP salary	£0.00	End date	04/08/2008
Full or part time	Full time	Annual UDA	0.00
Annual ERNIC amount	£0.00	Annual UOA	0.00
Annual service costs	£0.00		

Figure 16: performer details

This page [Figure 16] details various items relating to the performer:

- Performer Details
  - Name
  - Performer number
  - Message
    - *This performer is superannuable.*
    - *This performer is eligible for seniority.*
- Performer address details
  - Details of addresses associated with the performer on the contract. Personal address for the performer can be found within 'my profile'.
- Performer contractual details
  - May contain more or less items depending on relevance to specific performer.
  - Message



- *There will be no contributions to the NHS Pension scheme and no life insurance can be paid if Annual Net Pensionable Earnings does not have an amount.*

Displayed if the performer **is** superannuable but the net pensionable amount is zero.

- *To comply with the NHS Pension scheme requirements the Annual Contracted Allocation must be completed to ensure the correct calculation of the Net Pensionable Earnings for the contract.*
  - Displayed if the performer **is** superannuable but the allocated annual amount is zero.
- Trainer
- VDP salary
- Annual gross allocation
- Allocated annual amount – displayed in the event the allocated amount for the performer is > 0 and the performer **is** superannuable.
- Annual allocation
  - Displayed if the performer **is not** superannuable.
- Annual net pensionable earnings
  - Displayed if the performer **is** superannuable.
- Annual ERNIC amount
- Annual Grant amount
- Annual service costs
- Start date
- VDP contractual earnings start date for contract.
- End date
- VDP contractual earnings end date for contract.

Clicking on the *internet browser* back button at this point will take you back to the list of performers for further scrutiny. Alternatively you can use the navigation links to open up another view, e.g. the find contracts page [section 7.4].

### **7.3 Contract Details – Performer View**

Clicking on the contract number as a **performer** directs you straight to the performer details view described in section 7.2 above.

## 7.4 Find Contracts

### Find and view contracts

**Criteria**

Health bodies

(5N3) Wakefield District PCT

Contract numbers

All

Provider names

MISS SC Wilson

Starting between

01/06/2000

DD/MM/YYYY

and

28/06/2007

DD/MM/YYYY

Ending between

DD/MM/YYYY

and

DD/MM/YYYY

☐ Current contracts only

Type

☐ GDS ☐ GDS Pilot ☐ PDS ☐ PDS Plus ☐ PDS Pilot ☐ Trust ☐ Trust Plus

Purpose

☒ General ☐ Orthodontic ☐ Both

Attributes

☐ Prison ☐ Sedation ☐ Domiciliary

Clear criteria

Update list

Showing 1-1 of 1 items

Contract number	Provider	Contract value	UDA		UOA	
			Contracted	Processing	Contracted	Processing
<a href="#">(5N3) 243779 0001</a>	MISS SC Wilson	£783,363.32	26,556.00	-	0.00	-

Showing 1-1 of 1 items

Figure 17: find contracts

Opening the find contracts view presents you with a number of options with which to locate both current and historic contracts using various criteria. Only those contracts that have been opened since 1<sup>st</sup> April 2006 are available to view within the portal. We'll run through the options below:

- Health Bodies
  - Restrict search to a single health body by selecting one from the drop down list and then clicking the *Update list* button.
- Contract Numbers
  - Restrict search to a single contract number.
- Provider names
  - Restrict search to a single provider.
- Starting between
  - Refine the contract *start* dates between which you would like to search – e.g. selecting dates *starting between* 01/06/2006 *and* 28/06/2010 will return contracts that *started* on or between the two selected dates.
- Ending between
  - Refine the contract *end* dates between which you would like to search – e.g. selecting dates *ending between* 01/09/2008 *and* 28/02/2011 will return contracts that *ended* on or between the two selected dates.

- Current contracts only
  - Restrict the search to current contracts only.
- Type
  - Restrict the search to specified contract types.
- Purpose
  - Restrict the search to contracts with the specified purpose. Warning! Clicking *Both* here will only return contracts that are both general **and** orthodontic, not contracts that are general **or** orthodontic.
- Attributes
  - Restrict the search to contracts of the specified attributes.

The search filters can also be combined to restrict the search further, e.g. as in the screenshot [Figure 17] selecting the Health body, Provider names, Purpose and Starting between criteria sufficiently restricts the search parameters to only return a single contract result.

Clicking the Clear criteria button will reset all search filters.

Please note also that the columns displayed in the results table will depend on whether you are viewing the page as a provider or a performer. Section 7.1 refers.

## 7.5 Manage Bank Details

Before making any changes to your bank details, you must answer the important information questions in [Figure 1 **Error! Reference source not found.**] below.

**Important information**

1. If you are changing your details to a limited company you will not be able to make the update on this portal, please notify your Commissioning Body in order to make this change.

**Are you updating to a limited company?**

☐ Yes ☐ No

2. Only UK based bank accounts are allowed.

**Is your bank account based outside the UK?**

☐ Yes ☐ No

**Proceed**

Figure 18: manage bank details important questions

Once you have confirmed that you are not changing your bank details to a limited company account, and that your bank account resides within the UK – only then will you be able to proceed and make changes to your bank details.

**If you are changing to a limited company account or, if your account *is* based outside of the UK – please contact your commissioning body regarding the change.**

## Contracts

Enter new details

Sort code \*

-  -

Account name \*

Mr Peter Griffin

Account number \*

12345672

B/Soc roll number

Clear fields

Update selected contracts

\* Mandatory field

Showing : Current contracts only | [All contracts](#)

[Select all](#) | [Select none](#)

Changes saved ✓

Contract number	Provider	Sort code	Account number	B/Soc roll number	Account name
<input checked="" type="checkbox"/> (5N3) 243779 0001	MISS SC Wilson	00-00-03	12345672		Mr Peter Griffin
<input checked="" type="checkbox"/> (5N3) 243779 0002	MISS SC Wilson	00-00-03	12345672		Mr Peter Griffin
<input type="checkbox"/> (5N3) 243779 0003	MISS SC Wilson	18-88-27	481946993		Mehdi Abrishami
<input type="checkbox"/> (5N3) 243779 0004	MISS SC Wilson	91-08-69	110146522		C J AUSTIN AND J M LEWIS
<input type="checkbox"/> (5N3) 243779 0005	MISS SC Wilson	73-64-78	145910025		DR S REYHANIAN

Figure 19: manage bank details view

Once on the manage bank details view, you may proceed and update one or many contracts with valid bank details:

- Select the contract you wish to update by checking the checkbox(es).
  - Use the *Select all* or *Select none* button to check all or none of the contract checkboxes.
  - Use the *Current contracts only* or *All contracts* link to toggle the display between *current* and *all* contracts.
- Enter your valid bank sort code – 6 digits.
- Enter the account name.
- Enter your valid bank account number – 8 digits.
- Enter the roll number if necessary.
- Click on the *Update selected contracts* button.
- Confirm identify and authority to change by validating your password.
- Confirm that you definitely want to go ahead and change the bank details (or not) by clicking Yes (or No) on the pop-up.

If validation of your account details fails (see steps 2-5), the update will fail with an error message indicating what the problem is.

If validation succeeds the corresponding bank details will be updated and an email confirmation sent to the provider email address with details of the affected contract(s).

## 7.6 Contract Activity

From the Current or Find contracts views, clicking on a value in the UDA (or UOA) Scheduled or Processing columns [Figure ] will open up the *Contract activity* page [Figure ], for the contract (row).

Contract number	Provider	Contract value	UDA			UOA		
			Contracted	Scheduled	Processing	Contracted	Scheduled	Processing
<a href="#">(5PL) 623229 0003</a>	MR PJ NAVARRO LANDABURU	£141,888.08	1,000.00	<a href="#">0.00</a>	<a href="#">0.00</a>	2,452.00	<a href="#">82.80</a>	<a href="#">22.20</a>

Figure 20: UDA & UOA columns

The contract activity page displays a summary of activity against the selected contract for current or previous financial years. The financial year being viewed can be changed by clicking on the activity year button, e.g. *2012/2013 activity* in Figure below.

## Contract activity

(5N3) 243779 0001

Provider: MISS A MACASKILL

2012/2013 activity

2011/2012 activity

Showing activity for 2012/2013

Month	FP17 total	UDA			UOA			Net patient charges
		2012/2013	2011/2012	Previous	2012/2013	2011/2012	Previous	
<a href="#">July (to date)</a>	<a href="#">4</a>	15.40	0.00	0.00	(20.80)	0.00	0.00	£519.00
<a href="#">June</a>	<a href="#">21</a>	73.80	6.00	0.00	24.00	(25.60)	0.00	£896.20
<a href="#">May</a>	<a href="#">145</a>	241.60	75.70	0.00	48.00	109.00	0.00	£3,385.20
<a href="#">April</a>	<a href="#">147</a>	0.00	406.20	(5.00)	0.00	108.80	(1.00)	£4,329.90
<b>Total</b>	<b>317</b>	<b>330.80</b>	<b>487.90</b>	<b>(5.00)</b>	<b>51.20</b>	<b>192.20</b>	<b>(1.00)</b>	<b>£9,130.30</b>

Figure 21: Contract activity page

Reading from left to right across the page we can see the following data items:

- Month
  - The schedule month for the financial year
- FP17 total
  - The total number of FP17s received for the schedule month less any adjustments (e.g. rejected or deleted claims)
- UDA 2012/2013
  - Monthly UDA activity for claims processed and dated in the current financial year
- UDA 2011/2012
  - Monthly UDA activity for claims processed and dated in the previous financial year

- UDA Previous
  - Monthly UDA activity for claims processed and dated for any time prior to the current or previous financial years
- UOA 2012/2013
  - Monthly UOA activity for claims processed and dated in the current financial year
- UOA 2011/2012
  - Monthly UOA activity for claims processed and dated in the previous financial year
- UOA Previous
  - Monthly UOA activity for claims processed and dated for any time prior to the current or previous financial years
- Net patient charges
  - The total net patient charges collected for the schedule month

As is the norm, all columns can be ordered by clicking on the column headers.

#### 7.6.1 Contract Activity By Performer

We can drill down into this data still further if we wish (and if we are viewing in Provider mode). By clicking on the Month link (e.g. June) we open up the Contract activity by performer page, as shown in Figure .

Here we see the contract activity across all of the performers on the contract. The period being viewed is displayed above the activity table ("Showing activity for <month>"). The month can be changed by selecting a new value from the Month dropdown list (highlighted) and then by clicking on the Update list button.

You may return to the Contract activity summary page by clicking on the Show annual summary button.

## Contract activity by performer

(5N3) 243779 0001

Provider: MISS A MACASKILL

2012/2013 activity

2011/2012 activity

Month

June

Selecting a month will display activity of each performer on the contract

Update list

Show annual summary

Showing activity for June 2012

Performer	FP17 total	UDA			UOA			Net patient charges
		2012/2013	2011/2012	Previous	2012/2013	2011/2012	Previous	
243779 MACASKILL A	<a href="#">9</a>	13.40	0.00	0.00	23.00	0.00	0.00	£207.80
280992 ARSHAD E	<a href="#">5</a>	(1.45)	0.00	0.00	23.00	0.00	0.00	£104.00
357235 HOFFMAN F	<a href="#">-4</a>	15.00	(2.00)	0.00	(1.00)	0.00	0.00	£153.50
866792 ORR A	<a href="#">3</a>	21.00	(3.00)	0.00	1.00	(23.00)	0.00	(£79.90)
881031 JHAVERI M	<a href="#">0</a>	0.00	7.00	0.00	(1.00)	(1.00)	0.00	£75.60
882445 ETHERIDGE O	<a href="#">5</a>	33.25	12.00	0.00	(21.00)	0.00	0.00	£251.00
959545 CASPERSONN S	<a href="#">-1</a>	(10.80)	(3.00)	0.00	20.00	(0.80)	0.00	£80.20
991309 CHAPMAN E	<a href="#">4</a>	3.40	(5.00)	0.00	(20.00)	(0.80)	0.00	£104.00

Showing 1-8 of 8 items

1-8

Figure 22: Contract activity by performer (available in Provider mode only)

### 7.6.2 FP17 forms

Clicking on the FP17 total link [Figure ] in either the Contract activity view or in the Contract activity by performer view will open up the FP17 forms page, displaying all of the forms received for the month or by a performer for the month respectively. This view is available to both providers and performers.

Performer	FP17 total	UDA			UOA			Net patient charges
		2012/2013	2011/2012	Previous	2012/2013	2011/2012	Previous	
623229 NAVARRO LANDABURU P	<a href="#">-2</a>	0.00	0.00	0.00	23.00	(0.80)	0.00	£204.00

Figure 23: FP17 Total link

The various FP17 views are covered in more detail in section 8 FP17's below.

## 8 FP17'S

### 8.1 FP17 Forms Summary by Contract

In addition to the Contract activity pages described in the previous section, claim data can be viewed in summary form by clicking on the FP17 forms navigation link, thereby opening the *FP17 forms summary by contract* view [Figure 24: FP17 forms summary by contract]. This page is exactly the same whether displayed as a provider, or as a performer; however the figures displayed will be specific to the contract-

performer (when viewed in performer mode) or to the contract (i.e. across all performers) when viewed in provider mode.

[Home page](#)
[My profile](#)
[Contracts](#)
[Pay statements](#)

[FP17 forms](#)

[Reports](#)
[EDI PIN](#)
[User management](#)

[Current FP17 forms](#)
[Find FP17 forms](#)

## FP17 forms summary by contract

Summary of FP17 forms for the current schedule month by contract

Showing 1-1 of 1 items

Contract number	Provider	Total forms	UDA			UOA			Net patient charges
			2012/2013	2011/2012	Previous	2012/2013	2011/2012	Previous	
<a href="#">(5N3) 243779 0001</a>	MISS A MACASKILL	21	73.80	6.00	0.00	24.00	(25.60)	0.00	£896.20

Showing 1-1 of 1 items

Figure 24: FP17 forms summary by contract

Again, the columns displayed are much the same as those detailed for the Contract activity pages but with summarised totals instead of the more granular activity shown in the by-month or by-performer views:

- Contract Number
  - Your contracts for which there is current activity.
- Provider
  - The contract provider.
- Total forms
  - The total number of FP17s received for the schedule month less any adjustments (e.g. rejected or deleted claims)
- UDA 2012/2013
  - Monthly UDA activity for claims processed and dated in the current financial year
- UDA 2011/2012
  - Monthly UDA activity for claims processed and dated in the previous financial year
- UDA Previous
  - Monthly UDA activity for claims processed and dated for any time prior to the current or previous financial years
- UOA 2012/2013
  - Monthly UOA activity for claims processed and dated in the current financial year
- UOA 2011/2012
  - Monthly UOA activity for claims processed and dated in the previous financial year
- UOA Previous
  - Monthly UOA activity for claims processed and dated for any time prior to the current or previous financial years



- Net patient charges
  - The total net patient charges collected for the current schedule month

## 8.2 Current FP17 Forms

As per the Contract activity pages covered earlier, we can click on the FP17 Total forms value to drill down and view the actual claims received. Doing so opens up the Current FP17 forms page - Figure below.

### Current FP17 forms

(5N3) 243779 0001

Provider MISS A MACASKILL

June 2012: Showing 81-88 of 88 items

Ref number	Contract number	Patient			Performer number	UDA	UOA	Net patient charge	Schedule	Status
		Name	DOB	M/F						
112000011	<a href="#">(5N3) 243779 0001</a>	HERBERT HAVISHAM	08/06/1950	M	866792	3.00	0.00	£47.00	06/2012	Processing

Date of acceptance 12/04/2012

Date of completion 12/04/2012

Claim comments

Late submitted claim

Location ID 6752

Remission evidence not seen No

Patient charge on claim £0.00

Patient charge calculated £47.00

Patient charge scheduled £47.00

Remission amount £0.00

Schedule 06/2012

Allocated year 2012/2013

[Close](#)

<a href="#">112000012</a>	<a href="#">(5N3) 243779 0001</a>	BRADLEY HEADSTONE	08/06/1950	M	243779	1.00	0.00	£6.80	06/2012	Processing
<a href="#">112000013</a>	<a href="#">(5N3) 243779 0001</a>	MICHAEL JAGGERS	08/06/1950	M	280992	3.00	0.00	£47.00	06/2012	Processing
<a href="#">112000014</a>	<a href="#">(5N3) 243779 0001</a>	ABEL MAGWICH	08/06/1950	M	882445	3.00	0.00	£0.00	06/2012	Processing
<a href="#">112000015</a>	<a href="#">(5N3) 243779 0001</a>	SETH PECKSNIFF	08/06/1950	M	991309	1.20	0.00	£17.00	06/2012	Processing
<a href="#">112000016</a>	<a href="#">(5N3) 243779 0001</a>	TOM PINCH	08/06/1950	M	959545	1.20	0.00	£16.70	06/2012	Processing
<a href="#">112000017</a>	<a href="#">(5N3) 243779 0001</a>	HERBERT POCKET	08/06/1950	M	881031	0.00	0.00	£0.00	06/2012	Processing
<a href="#">112000069</a>	<a href="#">(5N3) 243779 0001</a>	ARTHUR TULKINGHORN	01/08/1999	M	357235	0.00	0.00	£0.00	06/2012	Deleted

Figure 25: Current FP17 forms

All information relating to the FP17 claims is displayed here, most of which is self explanatory:

- Reference number
  - The reference number can be either the image index number or the EDI claim reference number dependent upon the processing route.

- Clicking on the reference number opens up the claim details view, as shown above [Figure ].
- Contract number
- Patient name (surname, forename)
- Patient date of birth
- Patient gender
- Performer personal number
  - The performer associated with the claim
- UDA
- UOA
- Net Patient charge
- Schedule number
  - The schedule month/year against which the FP17 is assigned
- Status (i.e. 'Processed', 'Deleted' or 'Rejected')

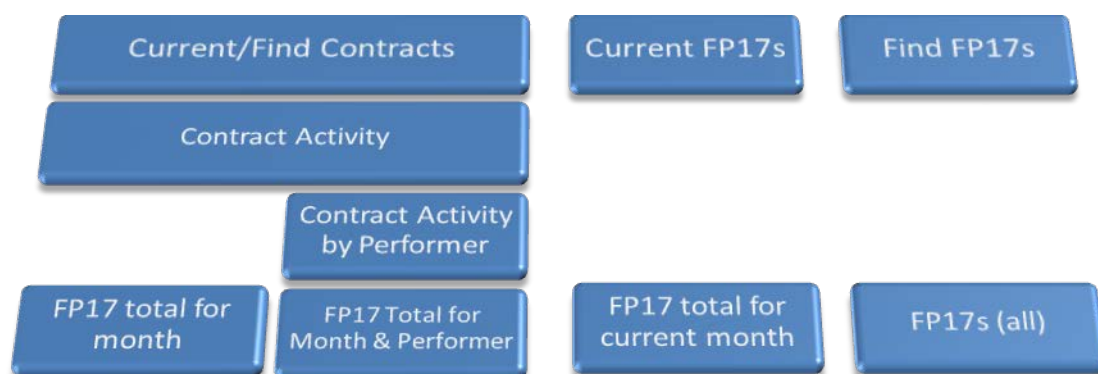
It's important to note that this screen can be viewed via several routes, each one with a slightly different perspective on the overall FP17s picture so, as demonstrated in Figure , the FP17 total for the *current* month could be viewed by following various paths:

- Current contracts
  - Contract activity (via UDA/UOA link for contract)
    - FP17 total for month (via month (to date) link).

Alternatively:

- FP17 forms summary by contract
  - FP17 total for month (via Total forms link).

The month and year values are always displayed above the results table to serve as a reminder of which FP17 view is currently being displayed.



**Figure 26: FP17 reporting routes**

A model of the various paths and corresponding links is included as an appendix - section 1. You can use this to learn how the various contract activity and FP17 pages are related to each other and the links that are used in order to navigate to them.

### 8.3 Find FP17's

FP17's can also be searched for via the Find FP17's link, which opens the Find and View FP17's page, Figure.

The number of FP17s being seared for can and should be filtered by using the various search options listed below.

- Health Bodies
  - Restrict search to a single health body by selecting one from the drop down list and then clicking the *Update list* button.
- Contract Numbers
  - Restrict search to a single contract number.
- FP17 form status
  - Restrict search to FP17s with a specific status.
- Schedule number *from*
  - Refine the FP17 *schedule* dates between which you would like to search – e.g. selecting dates *starting between* 04/2010 *and* 06/2010 will return claims that were processed in schedules 04/2010, 05/2010 and 06/2010.
- Performer names
  - Restrict search to a single performer
- Patient Surname
  - Search by patient surname
- Patient Forename
  - Search by patient forename
- Patient DOB
  - Search by patient date of birth
- FP17 Form Received between
  - Refine the FP17 *receipt* dates between which you would like to search – e.g. selecting dates *ending between* 01/09/2011 *and* 28/02/2011 will return claims that were received on or between the two selected dates.
- Acceptance Date Between
  - Refine the FP17 *acceptance* dates between which you would like to search – e.g. selecting dates *ending between* 01/05/2012 *and* 30/05/2012 will return claims that were accepted on or between the two selected dates.

- Completion Date Between

- Refine the FP17 *completion* dates between which you would like to search – e.g. selecting dates *ending between* 01/01/2012 *and* 01/03/2012 will return claims that completed on or between the two selected dates.

**Due to the large number of claims in the system, searches for claims without sufficiently restrictive criteria may take some time (upwards of 1min) to complete.**

## Find and view FP17 forms

**Criteria**

**Health bodies**  
All

**Contract numbers**  
(5PL) 623229 0003

**FP17 form status**  
Processed

**Schedule number from** to  
MM/YYYY MM/YYYY

**FP17 form reference**

**Performer names**  
623229 NAVARRO LANDABURU P

**Patient surname**

**Patient forename**

**Patient date of birth**  
DD/MM/YYYY

**FP17 form received between and**  
DD/MM/YYYY DD/MM/YYYY

**Acceptance date between and**  
DD/MM/YYYY DD/MM/YYYY

**Completion date between and**  
DD/MM/YYYY DD/MM/YYYY

Clear criteria
Update list

Showing 1-10 of 35 items

Ref number	Contract number	Patient			Performer number	UDA	UOA	Net patient charge	Schedule	Status
		Name	DOB	M/F						
<a href="#">25</a>	<a href="#">(5PL) 623229 0003</a>	ARTHUR MOUNTFIELD	30/06/1999	M	623229	0.00	1.00	£0.00	04/2011	Processed
<a href="#">51</a>	<a href="#">(5PL) 623229 0003</a>	ARTHUR BRAMBER	30/06/1999	M	623229	0.00	21.00	£0.00	04/2011	Processed
<a href="#">139</a>	<a href="#">(5PL) 623229 0003</a>	ARTHUR BROADSTAIRS	30/06/1999	M	623229	0.00	1.00	£0.00	04/2011	Processed
<a href="#">142</a>	<a href="#">(5PL) 623229 0003</a>	ARTHUR RAMSGATE	30/06/1999	M	623229	0.00	21.00	£0.00	04/2011	Processed
<a href="#">143</a>	<a href="#">(5PL) 623229 0003</a>	ARTHUR MARGATE	30/06/1999	M	623229	0.00	0.00	£0.00	04/2011	Processed
<a href="#">153</a>	<a href="#">(5PL) 623229 0003</a>	ARTHUR DEAL	30/06/1999	M	623229	0.00	0.00	£0.00	04/2011	Processed
<a href="#">1161</a>	<a href="#">(5PL) 623229 0003</a>	ARTHUR SHEERNESS	30/06/1999	M	623229	0.00	0.00	£0.00	04/2011	Processed
<a href="#">1162</a>	<a href="#">(5PL) 623229 0003</a>	ARTHUR UPNOR	30/06/1999	M	623229	0.00	0.00	£0.00	04/2011	Processed
<a href="#">1163</a>	<a href="#">(5PL) 623229 0003</a>	ARTHUR KNOLE	30/06/1999	M	623229	0.00	0.00	£0.00	04/2011	Processed
<a href="#">1164</a>	<a href="#">(5PL) 623229 0003</a>	ARTHUR PENSURST	30/06/1999	M	623229	0.00	0.00	£0.00	04/2011	Processed

Showing 1-10 of 35 items

[1-10](#)
[11-20](#)
[21-30](#)
[31-35](#)
[Next](#)
[Last](#)

Figure27: Find FP17's page

## 9 PAY STATEMENTS

The Pay statements view enables performer and provider users to search for and download Pay statements. When selecting a contract from the list and clicking on the *Show details* button, a list of the available pay statements are displayed for the highlighted financial year [Figure 20].

Clicking on the report *month* link in the Month column will spawn a new web internet browser window with options to:

- Open
  - Open the file for immediate viewing (additional software e.g. Adobe Reader may be required for this action).
- Download
  - Save the file to your PC (check your downloads folder or specify a location).
- Cancel
  - Take no further action and exit the new window.

The pay statements list consists of three columns:

- Month
  - Identifies the month to which the pay statement pertains.
  - Opens download window in internet browser if clicked on.
- Pay statement & Schedule
  - Indicates type of pay statement - examples in table below:

Month	Pay Statement	Schedule	Description
March	Yes	Yes	Pay Statement
March	Yes	No	Copy Pay Statement
February	Yes	Yes	Cleared previous month pay statement
January	No	Yes	Schedule
December	Yes	Yes	Released payment statement
November	Yes	No	Extra payment statement

## Pay statements

Select a contract

(5C3) 117242 0002

(5C4) 117242 0001

Show details

(5C3) 117242 0002

2010/11

2009/10

Month	Pay statement	Schedule
<a href="#">December</a>	Yes	Yes
<a href="#">November</a>	Yes	Yes
<a href="#">October</a>	No	Yes
<a href="#">September</a>	Yes	No
<a href="#">August</a>	Yes	No
<a href="#">July</a>	Yes	Yes
<a href="#">June</a>	Yes	Yes
<a href="#">May</a>	Yes	No
<a href="#">April</a>	Yes	Yes

Figure 28: pay statements

The selected financial year can be changed by clicking on the year link (e.g. 2009/10 above), however the link will only appear **if** there are reports held for the year. If for example there are no reports held for 2009/10, for the contract selected – the financial year link will not be visible.

Equally, if a report is not available for e.g. January, this will not appear in the list – as per Figure 20.

## 10 REPORTS

The Reports page enables provider and performer users to search for and download reports or pension statements respectively.

## 10.1 Provider Reports

Navigating to the reports view as a provider (remember the performer-provider switch [Figure 10] if you need to change view) equips you with several search and filter mechanisms, listed below:

- Type
  - Filter search by report type –
    - Annual Activity Report
    - General Vital Signs
    - Orthodontic Vital Signs
- Within financial year
  - Filter search by financial year.
- Within financial period
  - Filter search by report period –
    - Monthly
    - Quarterly
    - Mid & Year end.
- Contract number
  - Filter search by contract.

*Note: If there are no instances of a report type, year or period the checkbox filter will not appear for the associated filter mechanism (checkbox).*

The filters can be combined in order to refine your search as per the example [Figure 21] below:

- Search filter = {Annual Activity Report, 2011-2012, (5C3) 117242 0002}

# Reports

## Criteria

**Type**

☒ Annual Activity Report
 ☐ General Vital Signs
 ☐ Orthodontic Vital Signs

**Within financial year**

☒ 2011 - 2012
 ☐ 2010 - 2011
 ☐ 2009 - 2010

[Select all](#) | [Select none](#)

**Within financial period**

☐ Year End
 ☐ Quarter 4
 ☐ March
 ☐ February

[Select all](#) | [Select none](#)

---

**Contract number**

☒ (5C3) 117242 0002

[Clear criteria](#)
[Show details](#)

Showing 1-2 of 2 items

Type	Financial year	Financial period	Contract number	Guidance notes
<a href="#">Annual Activity Report</a>	2011 - 2012	Year End	(5C3) 117242 0002	<a href="#">Guidance notes</a>
<a href="#">Annual Activity Report</a>	2011 - 2012	Mid Year	(5C3) 117242 0002	<a href="#">Guidance notes</a>

Showing 1-2 of 2 items

1-2

Figure 29: provider reports example

The *Select all* and *Select none* links can be used to check/uncheck all filter checkboxes as required. The *clear criteria* button wipes out any changes made so you can start again.

The results table consists of the following columns:

- Type
  - The type of report to be downloaded
  - Clicking on the report name opens the internet browser download window with options to Open, Download or Cancel.
- Financial year
  - The financial year to which the report refers.
- Financial period
  - The financial period to which the report refers.
- Contract number
  - The contract number to which the report refers.
- Guidance notes
  - Support notes for the report to be downloaded.



- Clicking on the Guidance notes link opens the internet browser download window with options to Open, Download or Cancel.

## 10.2 Performer Reports

When viewing reports as a performer, only the financial year can be used to filter the reports since only one type of report is available – the Personal Superannuation Statement, displayed by selecting one or more financial years and clicking the *Show details* button.

### Reports

**Criteria**

**Within financial year**

☒ 2011 - 2012
 ☒ 2010 - 2011
 ☒ 2009 - 2010

[Select all](#) | [Select none](#)

[Clear criteria](#)
[Show details](#)

Showing 1-3 of 3 items

Type	Financial year	Creation date
<a href="#">Personal Superannuation Statement</a>	2011 - 2012	19/06/2012
<a href="#">Personal Superannuation Statement</a>	2010 - 2011	19/06/2012
<a href="#">Personal Superannuation Statement</a>	2009 - 2010	19/06/2012

Showing 1-3 of 3 items

1-3

Figure 30: performer reports

The statements can be downloaded by clicking on the *Personal Superannuation Statement* link.

## 11 EDI PIN

Your EDI PIN or temporary EDI PIN can be requested via the EDI PIN page. Once again, the facilities available to you on this page will vary depending on whether you are a provider or a performer.

### 11.1 Provider EDI PIN

The EDI PIN page when viewed as a provider will enable you to request temporary EDI PINs for performers associated with your contracts. Their performer number and name is displayed along with a request EDI PIN link [Figure 23]. Before requesting an EDI Temporary PIN for one of your performers you will need to know the Site Number that they transmit from. The temporary PIN will allow you to submit outstanding claims for a performer who is no longer at the practice.

## Temporary EDI PIN

Performer number	Performer name	
610828	Charles Nicholas Rennie	<a href="#">Request a temporary EDI PIN</a>
770213	Noushafarin Davies	<a href="#">Request a temporary EDI PIN</a>
786950	Sarah Hamoudi Ludwig	<a href="#">Request a temporary EDI PIN</a>
866776	Fabio Creaner	<a href="#">Request a temporary EDI PIN</a>
982040	Andrea Louise Owen	<a href="#">Request a temporary EDI PIN</a>

Figure 31: Provider request temporary EDI PIN for Performer initial page

Selecting a performer and then clicking on the *Request a temporary EDI PIN* link will open a new page [Figure 24] in which you may specify the site number for which the temporary EDI PIN is required.

### EDI PIN

**Request temporary EDI PIN**  
By sending a request for a temporary EDI PIN, you are confirming you have the authority to do so.

<b>Performer number</b>	<b>Enter site ID</b>
982040	<input type="text"/>

**Send request**

Cancel

Figure 32: Provider requests temporary EDI PIN for Performer

After entering the site number and clicking the *Send request* button, the portal will ask for password confirmation. Having completed this, the temporary EDI PIN request will be sent for processing.

Alternatively you may discontinue the request at any stage by clicking the *Cancel* button.

If an additional PIN(s) is required for the same performer then further requests can be made, providing they are not for the same site number.

Once the request has been sent you will be returned to the Temporary EDI PIN page with a confirmation of request(s) displayed [Figure 25]. You will receive a response for the request via email within 24 hours, the PIN number will not be held within the email this will be visible within the portal.

982040

Andrea Louise Owen

[Request a temporary EDI PIN](#)

Site ID	EDI PIN	Expiry	Message
15515	Requested 20-06-2012	-	-

Figure 33: temporary EDI PIN request confirmation

After the request has been processed, you will receive an email confirming the request outcome (normally within approximately 24 hours) – *EDI PIN created* or *EDI PIN request rejected*. The outcome can also be verified (with the rejection reason if the request failed) on the portal EDI PIN page as per Figure 26 below.

- Performer 280992 has 2x EDI PIN requests logged –
  - The pin for site 12345 has been rejected.

- The pin for site 54321 has been approved and is listed [2222] alongside the *temporary* PIN expiry date – 30-07-2012.
- Performer 770213 has 1x EDI PIN request logged –
  - The PIN for site 12345 has been approved [1111] and expires 30-07-2012.

Performer number	Performer name		
<b>280992</b>	<b>Anthony Joseph Palliser</b> <a href="#">Request a temporary EDI PIN</a>		
Site ID	EDI PIN	Expiry	Message
12345	Rejected request from 10-07-2012	-	Invalid site number
54321	2222	30-07-2012	-

Performer number	Performer name		
<b>357235</b>	<b>Jennifer Anne Singh</b> <a href="#">Request a temporary EDI PIN</a>		
Site ID	EDI PIN	Expiry	Message
12345	1111	30-07-2012	-

Figure 34: temporary EDI PIN status

## 11.2 Performer EDI PIN

As a performer the EDI PIN request relates to your personal EDI PIN number. As such, the page appearance is slightly less complex [Figure 27].

### EDI PIN

You don't have an EDI PIN assigned

[Request new EDI PIN](#)

Figure 35: performer EDI PIN view

Clicking on the Request new EDI PIN button will redirect you to the confirm password page. Once your credentials have been verified the request will be logged [Figure 28]. You will receive a response for the request via email within 24 hours, the PIN number will not be held within the email this will be visible within the portal.

### EDI PIN

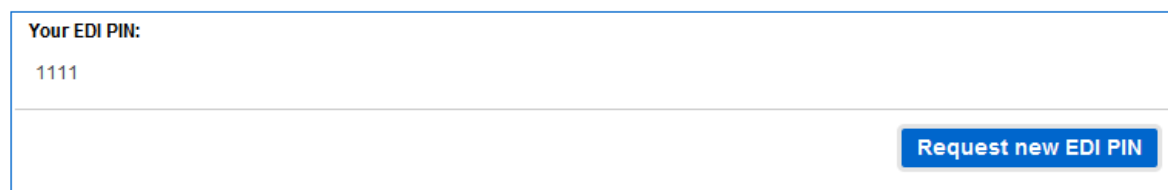
**EDI PIN request received on 20/06/2012 at 15:55**

You should receive an email when your new EDI PIN is ready. This normally takes one working day. If you are having problems, please contact the helpdesk - 0845 126 8000.

Figure 36: performer EDI PIN request confirmation

Once the request has been processed you will receive an email notification of the outcome, success or failure. You may view the EDI PIN page to obtain the PIN if the request was successful [Figure 29] or the rejection reason [Figure 30] if it could not be processed.

## EDI PIN



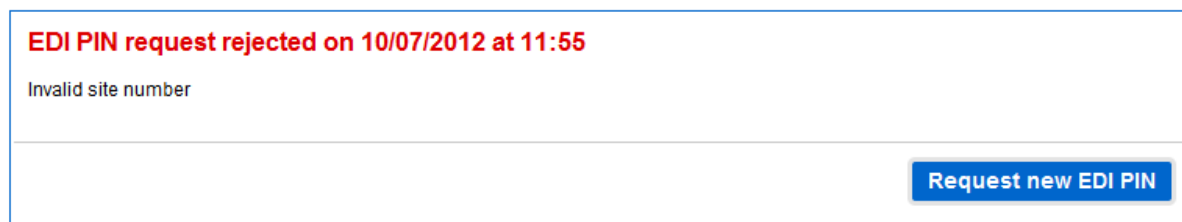
Your EDI PIN:

1111

Request new EDI PIN

Figure 37: performer EDI PIN

## EDI PIN



EDI PIN request rejected on 10/07/2012 at 11:55

Invalid site number

Request new EDI PIN

Figure 38: rejected performer EDI PIN

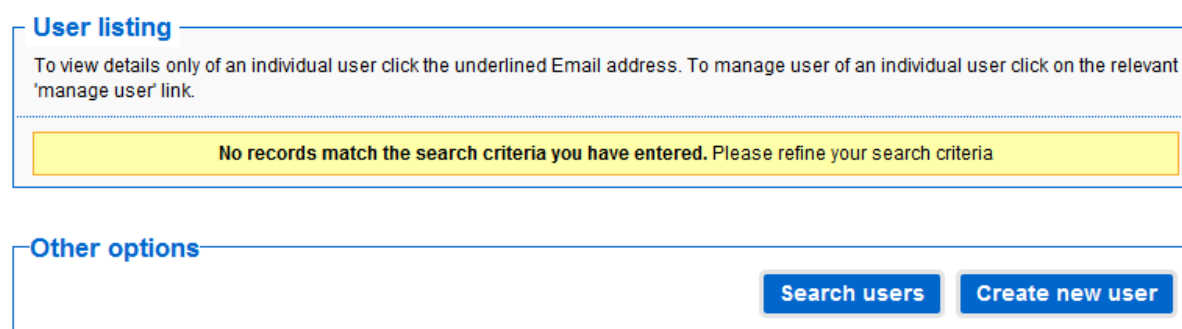
## 12 USER MANAGEMENT

It is possible for Providers to create additional user accounts and assign privileges and restrictions for the administration of various tasks within the portal. Providers can create and manage their administrator-users on the User management page.

### 12.1 Create an Administrator

The first time you navigate to the View and maintain user's page it will look like Figure 31 below. Once some administrator users have been created, we'll see a bit more activity.

## View and maintain users



User listing

To view details only of an individual user click the underlined Email address. To manage user of an individual user click on the relevant 'manage user' link.

No records match the search criteria you have entered. Please refine your search criteria

Search users Create new user

Figure 39: manage users first view

Let's create our first one by clicking on the *Create new user* button. This will start the user creation process by requesting the following mandatory user details:

- New user email address
  - This is the email address that the portal will use to communicate with your admin-user. Be sure to use the correct address as they will need to activate their account (refer to section 2 Initial Steps for more information about the activation process) via the email address entered here. The email address should be unique. Duplicate email addresses will not be accepted by the system.

- New user forename
- New user surname
- New user telephone number

**Enter new user details**

Enter the details requested in the boxes provided and click Next.

\* Mandatory Fields

**New user email address \***

This will also be their username

**New user forename \***

**New user surname \***

**New user telephone number \***

**Next**

Figure 40: create admin-user - new details

Clicking on the *Next* button when done will check the details entered for any errors (e.g. the email address is not valid) and then progress to the next section – Assigning actions and contracts/providers to the user [Figure 33].

Check the appropriate box according to which contract(s) you would like your admin-user to be able to administrate on your behalf, then click the *Next* button to proceed when done.

**Assign the user to contracts**

Select the contract(s) to whom the user is to be assigned and click 'Next'.

☒ **All contracts**

☒ **(5QK) 773859 0001 - MR M Evans - 6A Arena Parade, 206 Camp Hill Road**

☒ **(5QK) 773859 0002 - MR M Evans - Parade Dental Practice, 18 Victoria Gardens**

[Back](#) **Next**

Figure 41: create admin-user - assign or restrict contracts

On subsequent visits to the admin-user creation process, you will see the screen below [Figure 34] prior to the Assign contracts view. This provides you with the facility to simply assign contract/provider rights to the new user based on the privileges of a user created previously.

Selecting a user and then clicking on the *Copy user* button will assign the same contract/provider level privileges to the new admin-user as for the selected user.

Clicking on the *Don't copy* button will skip the assignment and take you to the Assign contracts page [Figure 33] for manual selection.

### Assigning actions and contracts/providers to the user

You can copy the access rights of an existing user to this new user if preferred.  
Select a user from the list below and click 'Copy user', otherwise click 'Don't copy' to continue.

Users

Tommy Tester

[Back](#)

Don't copy

Copy user

Figure 42: optional create admin-user step – assign actions based on another user

Once contracts and/or providers have been assigned, you may proceed to select which actions will be available to your new admin-user [Figure 35]. Check or uncheck the areas of the portal you wish to give the admin-user access to.

**Note:** The Manage Bank Details area requires access to Contracts also, since access to the Manage Bank Details area is *via* the Contracts pages. You *must* enable both Contracts and Manage Bank Details actions together, or neither.

Once done, click the *Next* button to proceed.

### Enter the actions available to the user

☒ All Actions
☒ My profile.
☒ User management.

☒ Contracts.
☒ Pay statements.
☒ Manage Bank Details.

☒ Reports.
☒ EDI PIN.

[Back](#)

Next

Figure 43: create admin-user - assign or restrict available actions

Having given your admin-user some credentials, access to contracts, providers and actions – we're done! A summary of your choices is displayed for you to confirm [Figure 36]. Click on the *Finish* button if you're happy. Otherwise, click *Back* through the admin-user creation pages and modify as required.

Below is a summary of the assigned providers, contracts and actions you are creating for the new user.  
Click 'Finish' to complete the user creation or click 'Back' to change these details.

#### Providers accessible to the user

MR M Evans (773859)

#### Contracts available to the user

(5QK) 773859 0001 - MR M Evans - 6A Arena Parade, 206 Camp Hill Road  
(5QK) 773859 0002 - MR M Evans - Parade Dental Practice, 18 Victoria Gardens

#### Actions available to the user

My profile.	User management.	Contracts.
Pay statements.	Manage Bank Details.	Reports.
EDI PIN.		

[Back](#)

[Finish](#)

Figure 44: create admin-user - confirm details

Once done, a confirmation message is displayed [Figure 37]. An email will be sent to the users email address containing an activation link. Once activated [section 2 Initial Steps refers] your admin-user will be ready to go.

## User successfully created

The administrator user has been successfully created. An activation email will be sent to the users email address to set their password and activate their user account.  
To create another user click 'Create User', otherwise click 'Home' to return to the Home page.

[Create User](#)

[Home](#)

Figure 45: create admin-user - confirm creation

An overview of the permissions available to admin-users is included below for reference.

- Update the Provider(s) associated with the user
  - Where more than one provider is available, admin-users can be restricted to one or more providers as required using the *All providers* or individual provider checkboxes.
- Update the contracts accessible to the user
  - Where more than one contract is available, admin-users can be restricted to one or more contracts as required using the *All contracts* or individual contract checkboxes.
- Update the actions available to the user
  - The user may be restricted to areas of the portal by selecting or deselecting actions as required, or by checking the *All Actions* checkbox. Actions correspond to chapters of this document as follows:
    - Contracts – section 7
    - Reports – section 9
    - My Profile – section 6
    - Pay statements – section 8
    - EDI PIN – section 10
    - User management – section 11
    - Manage Bank Details - section 7.5

## 12.2 Manage Administrator Users

Once some admin-users have been created, we need to manage them. This can be done via the user management screens. Clicking on the User management link opens up the View and maintain users summary page with a list of all our admin-users [Figure 38].

We can see there are two admin-users listed below. One with an active account (i.e. they have received their activation link and used it to activate and login to their user account) and one non-active user [*Account status* column]. We can examine these users more closely by clicking on the *Manage user* link and thereby opening the User details view [Figure 39].

Clicking on the admin-user email address instead of the Manage user link will open up the User details view in non-editable mode. Clicking on the *Edit* button at the bottom of the page will enable you to make changes where required.

**Note:** The user details view will open by *default* if you have only one user (there is no *list* to display). Clicking on the *Edit* button enables changes to be made.

### View and maintain users

#### User listing

To view details only of an individual user click the underlined Email address. To manage user of an individual user click on the relevant 'manage user' link.

Showing 1-2 of 2 items

Email address	User surname	User forename	Last login	Account status	Account removed	Manage
<a href="#">sknight-9999@technophobia.com</a>	Tester	Tommy	21/06/12 09:59:55	Active	No	<a href="#">Manage user</a>
<a href="#">sknight-99991@technophobia.com</a>	Tester	Ted		Newly Created	No	<a href="#">Manage user</a>

Showing 1-2 of 2 items

1-2

#### Other options

[Search users](#)[Create new user](#)

Figure 46: manage admin-users view

Once in the edit user details view [Figure 39], we can make various changes:

- User details
- Account locked
  - Check this box to force the admin-user to change their security credentials (password or memorable word) the next time they login.
  - Or, if the the user has forgotten their password checking this box will enable them to reset their details (section 4 – Forgotten Credentials refers).
- Account access removed
  - Check this box to remove the user-admin from the system. Please note that **this action is irreversible**. The user will not be able to login again using the same email – ever!
- Copy existing user profile
  - Copy provider or contract privileges from a previous admin-user.
- Update the Provider(s) associated with the user
  - Add or remove provider privileges by checking the relevant boxes.



- Update the contracts accessible to the user
  - Add or remove contract privileges by checking the relevant boxes.
- Update the actions available to the user
  - Add or remove action privileges by checking the relevant boxes.

When done, click Save to confirm the changes or Cancel to revert.

#### User details

<b>User email address</b> sknight-94.2@technophobia.com	<b>Date user created</b> 24/08/2012	<input type="checkbox"/> Account Locked
<b>User forename</b> simon	<b>User created by</b> Van Woudenberg	<input type="checkbox"/> Account Access removed
<b>User surname</b> jknight	<b>Date last updated</b> 24/08/2012 15:50:59	
<b>Date last logged in</b> 24/08/2012 16:33:22	<b>Last updated by</b> simon jknight	
<b>Contact Telephone Number</b> 077756762227	<b>Failed Login Count</b> 0	

#### Copy existing user profile

If you want to copy an existing user's profile, select a user from the list below and click 'Copy user'

##### Users

simon jknight

Copy user

#### Update the Provider(s) associated with the user

- ☐ All providers
- ☒ MISS LA EDGAR (332151)

#### Update the contracts accessible to the user

- ☒ All contracts
- ☒ (7A6) 332151 0001 - MISS LA EDGAR - Cosmo Dental Practice, 169 Kingsland Road

#### Update the actions available to the user

- |  |   |  |
|--|---|--|
| <input checked="" type="checkbox"/> All Actions          | <input checked="" type="checkbox"/> My profile. | <input checked="" type="checkbox"/> User management. |
| <input checked="" type="checkbox"/> Contracts.           | <input checked="" type="checkbox"/> FP17 forms. | <input checked="" type="checkbox"/> Pay statements.  |
| <input checked="" type="checkbox"/> Manage Bank Details. | <input checked="" type="checkbox"/> Reports.    | <input checked="" type="checkbox"/> EDI PIN.         |

C

Save

